Process Flows Add to Pending Mutual Funds List Return Message Confirming Deletion Yes Resume? MR R Return Message Confirming Deletion Return Message Confirming Change g ટ Delete from Mutual Fund List Duplicate Holding? Return Duplicate Holding Message Yes Update AA and Mutual Fund % Update Pending Mutual Funds List Yes Return Invalid Ticker Message Yes Valid Are you sure? Yes ŝ MR Yes Are you sure? ŝ AR S Are you sure? ŝ MR Select Mutual Fund Enter Mutual Fund Ticker Enter New AA or Mutual Fund % Incorporate Asset Allocation Spund alalad Done Spund Ppy Z.1.3.4 Modify Recommendation Edit Percentages Modification Choose Method Ϋ́es Valid Amount? Enter Portfolio \$ Amount Start

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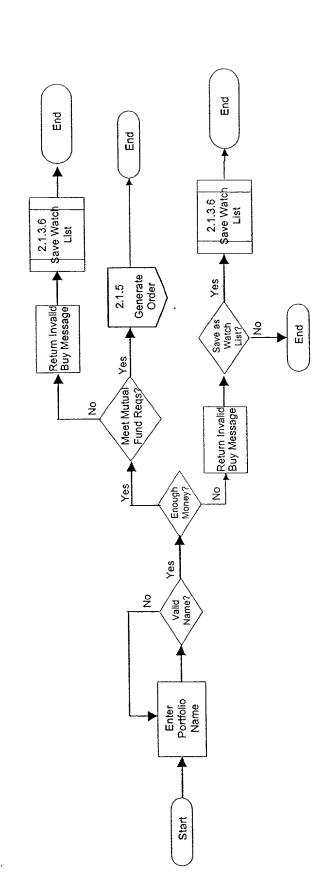
<u>.</u>

End

MR

Return Message Confirming Addition

MR



Process Flows

